

# Sage SalesLogix Mobile

## Full-Featured CRM Solution on a Handheld Device

Sage SalesLogix Mobile allows you to view, edit, and add contact and account details, take notes, schedule meetings, complete activities, update opportunities, and review ticket information — all from a handheld device. You can easily access key customer information using quick lookups or filtered searches. SalesLogix Mobile enables account, opportunity, and ticket management from handheld devices so employees always have access to the most up-to-date customer information, whether in the office or on the road.

## Rich End-User Experience

Since SalesLogix Mobile replicates familiar Sage SalesLogix functions on both Windows Mobile and BlackBerry devices, it's easy to stay on-the-go and be productive. SalesLogix Mobile offers incredible speed and performance. Rich features such as one-click dialling or e-mailing from contact or activity records, handwriting recognition, BlackBerry dashboard capabilities, and integration with Pocket Outlook enable users to get the most from Sage SalesLogix, while taking advantage of the convenience and productivity afforded by their handheld devices.

## The Information You Need, How You Need It

Many Sage SalesLogix customers tailor their CRM solution to meet their unique business requirements. In addition to basic contact and account information, with SalesLogix Mobile, you can access data from custom tables, extensions, pick lists, and other customised fields. The mobile application can also be easily customised using visual drag-and-drop design tools. For a seamless transition, the mobile and Web client customisations are developed and managed within the same development environment.

SALES

MARKETING

CUSTOMER SERVICE

ONSITE ENGINEERS

SUPPORT

MOBILE

Sage SalesLogix is an integrated customer relationship management (CRM) suite that includes Sales, Marketing, Customer Service, and Support automation solutions. Sage SalesLogix Mobile extends CRM capabilities to mobile devices, delivering rich functionality and the real-time convenience of wireless.



# Features



## Full-Featured CRM

- View and update contact, account, and opportunity information and related notes and history
- Schedule and track activities with a visual drag-and-drop calendar
- Access sales opportunity information including products and pricing
- View related customer tickets and service history and access resolutions
- Perform lookups and create dynamic groups
- Quickly access time-sensitive information using "Favourites"
- Increase efficiency with one-click dialing and handwriting recognition
- Dashboard views extend out to mobile devices with the ability to create and display customised charts

## Flexible and Secure Updating

- One-click synchronisation using wireless, wired, or dial-up connections back to the Sage SalesLogix Host Database or Remote Client
- Lightweight, incremental updates for fast and secure updating of client configuration changes, database schema changes and bi-directional information updates
- Speedy and secure updating through field-level updates
- Rules-based push to BlackBerry devices – avoids the synchronisation of "noise," just the desired information updates at the right time
- Pluggable security model ensures integrity of data during synchronisation
- Mobile subscriptions for rapid synchronisation and anytime data access

## Robust Mobile Management Platform

- Deploy on popular Windows Mobile and/or BlackBerry devices
- Tailor the solution to meet the unique and changing needs of your organisation and mobile user community
- Centralised deployment, management, and updating of multiple BlackBerry and Windows Mobile devices
- Flexible and extensible customisations supported through simple drag-and-drop development environment
- Uses native application development environments for the richest application experience for Windows Mobile (.Net) and BlackBerry (J2ME)
- Access existing tables, extensions, pick lists, and other customised fields from Sage SalesLogix

# About Sage

Headquartered in Newcastle upon Tyne, Sage (UK) Limited is a subsidiary of The Sage Group plc, a leading supplier of business management software and services to 5.4 million customers worldwide. From start-ups to larger organisations, Sage makes it easier for companies to manage their business processes.

Formed in 1981, the Group was floated on the stock exchange in 1989 and now employs 13,000 people in its market leading companies worldwide. Working with its community of UK accountants, business partners, developers, banks and retailers, Sage is exclusively focused on providing UK businesses in all sectors with specific, scalable software and services to help them manage their finances, their people, their customers, their suppliers, their core operations and to plan their future business success.

In the UK alone, Sage employs over 1600 people and provides software and services to over 700,000 small and medium-sized businesses. These products range from accounts, payroll, forecasting and business intelligence to customer relationship management, e-business and help for start-ups. Services include Excel Support, HR Advice, Health and Safety Advice and training courses.

## PINNACLE

Computing Solutions

Talk to us!

t: UK: 0845 120 0064 / ROI: 01 419 8990

e: [sage@pinnacle-online.com](mailto:sage@pinnacle-online.com)

w: [www.pinnacle-online.com](http://www.pinnacle-online.com)

